

Connections | June 2022

Managing your personal wealth isn't just about the dollars and cents. It's about connecting with what matters to you. Across all generations from life changes through life stages, Mesirow is here to help. That's why every quarter we write content on topics that we hope are relevant and insightful for you.

Inflation, interest rates and your pocketbook

The US Government and the Federal Reserve took aggressive action to support the US economy during the pandemic. Over two years later, we are experiencing the inflationary effects of those stimulus programs. The Russian invasion of Ukraine further jolted inflation as the commodity and oil markets spiked and supply chain disruptions worsened. Today, inflation continues at the highest rate since the early 80's and the Federal Reserve is taking action to combat it. Learn more about how such an environment could affect your personal finances.

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Market volatility can create tax-smart opportunities

Although periods of market volatility can often create investor anxiety, the gains and losses incurred during up and down markets can be leveraged to work together to minimize the taxes investors pay on capital gains. Through a practice called "tax loss harvesting," a savvy investor and wealth advisory team can strategically reduce federal tax liabilities without impacting long-term investment plans.

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Delay taxes on appreciated investment property of business assets

Many of our clients own business assets or personal property that have appreciated in value and struggle with ways to sell these assets without triggering immediate capital gains taxes. The good news is, there is a way to defer these taxes by using a 1031 Exchange.

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3 ways to protect yourself from online theft and fraud

With our increased dependency on internet-based online solutions, it is important to keep your information safe and secure. Three ways to do this include using multi-factor authentication, creating secure passwords and protecting your personal information.

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Tools you can use

2022 planning guide

We have also included a link to the recently updated [2022 planning guide](#).

Document locator

How easy is it for you or a family member to locate your most important documents in an emergency? Mesirow's [document locator](#) provides you with a simple way to log the location of all for your key documents.

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